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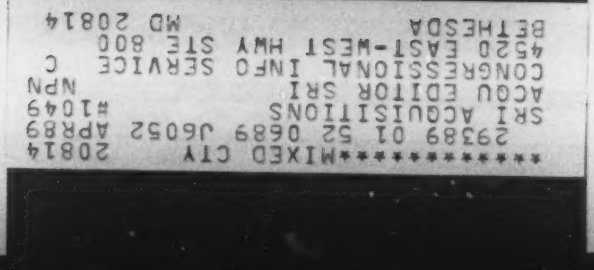
How Jobber Wins With Small Town Stations
What To Know About Hazard Communication
Why Industry Is Focusing On PMPA

NPN

National Petroleum News

Why Jobbers Should Consider Tune-Up Shops For Diversifying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Editor's Viewpoint

A lot of marketers are beginning to realize that the Environmental Protection Agency deadlines for the technical requirements of its underground tank regs are an illusion. On paper, the EPA set the timetable. In practice, however, the realities of the marketplace dictate. Who's really calling the shots? Let's take a look.

The financial responsibility segment of the regs, which establish pollution liability requirements and dates by which they must be met, is the pivotal factor. Concern over availability and affordability of environmental liability insurance that meet EPA minimums are compounded by mixed signals between marketers and insurance carriers. Marketers and association executives told us insurance companies wouldn't write policies for them. Insurance companies denied that. After going back and forth a few times and looking into the matter more deeply, it turns out both, in a sense, are right.

The insurance companies will provide coverage alright—if marketers meet certain requirements. And those requirements often amount to complying with key provisions of EPA's technical standards—upgrading (cathodically protecting steel tanks, installing leak detection devices, meeting spill and overfill requirements, etc.) or replacing old tanks. A soil test is also almost always required, and most sites in operation for any length of time will very likely show some sign of pollution. Insurance companies say they'll cover marketers who don't do this, but premiums will be very high. (That gets into the affordability vs. availability debate, something we'll cover in an upcoming issue.)

The EPA regs provide a 10-year phase-in period to implement the technical standards. But the financial responsibility requirements must be met sometime between now and October 1990 at the latest, depending on how many tanks you have. If insurers won't write a policy until key technical regs have for all intents and purposes been met, then the deadline for complying with those technical regs is, in effect, the same as those for the financial responsibility requirements. The 10-year phase-in is rendered meaningless and insurance companies are setting the deadlines.

Let's point out that the insurance companies are probably acting in what they believe is a prudent manner. In their place, would you just cover a marketer with 20-year-old unprotected steel tanks? (Some insurance companies are, in fact, doing that for their current long time customers.) Nonetheless, marketers are for now caught between the rock and the hard place—either shell out big bucks to get insurance without meeting the requirements or shell out big bucks to upgrade and get insurance at a lower price.

—Frank M. Victoria

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NATIONAL PETROLEUM NEWS

14 Regional News

14 West
Is BP getting ready for big move in West?

16 South
Marketers want gasohol labeling repeal rescined

20 East
Offshore drilling being revived in Atlantic

22 Midwest
New president vows Clark Oil recovery

25 General News

25 Big fight looming over PMPA amendments

25 Tax cheats continue to plague industry

26 PMAA survey stirs up controversy

28 Forecast: Gasoline demand to grow, then decline

30 Coastal kicks off national franchise program

30 Marathon unveils 92-octane unleaded

30 Analyst says import fee would be debacle

32 Jobber strength shown in association survey

32 Offshore moratoria hinders energy security

34 Report says low-lead damages farm/marine engines

34 Self service grows at record rates

37 Hunter purchases three magazines

37 Total, Wright combine on credit card

38 Features

38 Cover Report
Are tune-up shops a good bet for diversification?

42 Management
How to cope with OSHA's hazardous communication standard

52 Marketing
How jobber turns small town sites into money-makers

72 Marketing Management—Paul Forbes
Management skill two: problem solving

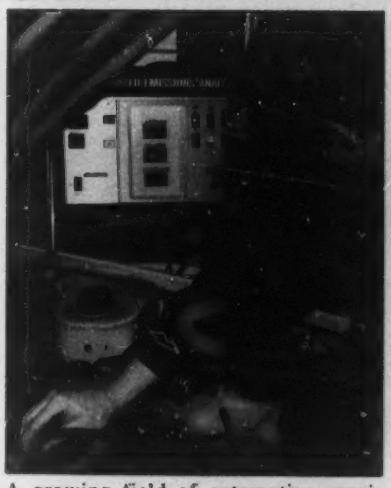
74 Tax Corner—Irving Blackman
Transferring business to kids is tougher

76 O&E Management—Howard Upton
Parable of the Connecticut Turnpike

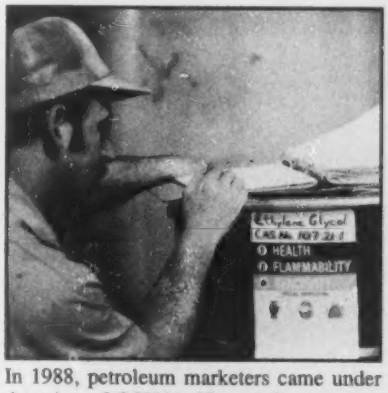
78 Legal Tips—Sam Borenkind
Supreme Court weakens forum clause

Departments

79 About Oil People
9 Ahead of the News
58 Briefs
11 Catching Up
84 Classified
56 Coming Meetings
3 Editor's Viewpoint
12 Marketplace
62 Product Showcase
12 Trends



A growing field of automotive repair specialization—the engine tune-up shop—could be just the ticket for marketers looking for a profitable area for diversification. But, proceed with care. Tune-ups are much more sophisticated these days. **Page 38**



In 1988, petroleum marketers came under the wing of OSHA's Hazard Communication Standard (HCS). Here's a briefing on what marketer responsibilities are under the standard and how to meet those responsibilities. **Page 42**

Michigan marketer James Ahearn has achieved extraordinary gasoline and C-store sales volumes with comparatively minimal investments by upgrading a group of "old dog" service stations. **Page 52**

• TRENDS

RVP And States Rights: Is A Showdown Ahead?

Push, shove and Reid Vapor Pressure Standards are on a collision course in the Northeast with May 1 as the date for a showdown which may—or may not—produce conclusive results. The greater likelihood is that it is going to set off a summer of discontent as a variety of states righters, suppliers and federal authorities joust for dominance.

What happens here may also cast long shadows on other parts of the country which have smog and air pollution problems.

RVP is a gasoline volatility standard. Higher RVPs help cold weather start-ups, minimize stalling problems and keep engines chugging happily in the winter months. But lower RVPs produce the same results in the warmer months and, at the same time, contribute significantly to a reduction in atmospheric contamination.

That's what the fuss is all about. Northeasterners want the RVP standard lowered in the interests of cleaner air, even though they may have to pay more for their gasoline in the summer months or even run into shortages here and there. Shortages, if they do develop, would probably only affect premium grades of gasoline—not the mids and regulars.

All of the New England states plus New York and New Jersey made a common agreement in November 1987 demanding that RVPs be reduced from the present level of 11.0-psi to a maximum of 9-psi before the summer driving season starts May 1 [*NPN*—Jan. '88, p20].

The Environmental Protection Agency, which has been criticized for its snail-like approach to the problem, is still debating its course of action amid indications it is thinking of a standard of 10.5-psi. That would make gasoline suppliers happier.

EPA is also said to be considering a standard that preempts local rules and regulations, a concept that virtually all suppliers endorse. But if it does happen, it will rile the states righters who have been fighting for local jurisdictions to solve local problems.

EPA's track record for taking decisive steps isn't all that good, however, so no one is really sure at this point whether it will intervene before May 1 or stand by and watch the regional plan go into effect.

It's a safe bet to presume that there will be court battles this summer no matter which side comes out on top. Massachusetts has already forced EPA to back off somewhat. It threatened to sue EPA if a national standard was imposed and won the right to retain its stricter local standard—meaning an RVP of 9-psi.

Meantime, the queasiness of the situation put most suppliers on the spot. The local regulations require that all service stations must be supplied in advance with the RVP 9-psi gasoline so that they can begin selling it beginning May 1.

Suppliers say it takes as much as two months to get every station positioned to obey the law. They also say that after the September. 1 cutoff date, it takes another two months to replace the summertime gasoline with a winter grade of 11 or 10.5, or whatever it may be. Thus their "season" is not May 1 to September 1 as the regulations require, but March 1 to November 1.

There has been much talk about a lowered RVP hiking gasoline prices 1-3¢/gal. to cover higher processing costs. There's also talk that refining capacity has no surpluses to fall back on. Neither of these two items make much sense right now—crude supplies are more than ample around the world and these usually restrain product price increases; and as far as refining capacity is concerned, the industry has been utilizing between 80% to 85% in recent years. Thus it has at least a 15-20% safety level.

There used to be a concept in the refining segment in the 1960s called the "incremental barrel." This implied that the more the refiners ran their equipment, especially in the 90% ranges, the more economical their costs overall, especially as they applied to the additional barrel. Is this concept passe now?

—by J. Richard Shaner

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (per gal.)

JANUARY	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg:	0.944	0.876	0.918	1.091
Regions:				
Northeast	1.010	.930	.966	1.152
North Central	.938	.890	.914	1.103
South	.949	.881	.920	1.069
West	.896	.848	.883	1.048

Source: U.S. Dept. of Labor, Bureau of Labor Statistics

STOCKS (add 000 bbl.)

	3/3/89	3/4/88
Gasoline (total)	246,200	236,748
Gasoline (unleaded)*	165,493	147,619
Jet Kerosine	35,720	37,853
Distillates	106,483	106,567
Residual	43,649	43,954

** Included in gasoline total*
Source: American Petroleum Institute

New Forecast Says Gasoline Demand Will Grow, Then Erode In The '90s

For the next 10 years—the last decade of the 20th Century—the outlook for oil marketers is both comfortable and uncomfortable: solid in the sense that supply factors should be steady in the '90s but depressing too in that the latest long-term projection implies only minor-to-modest growth in demand.

Gasoline, the industry's frontline product, will suffer the most in the decade ahead, according to the federal government's energy experts.

Gasoline demand, they now say, will peak in 1992 at 7.46-million b/d then decline annually until 2000, when a mod-

(Continued on page 30)

Long-Term Crystal Ball: What The Federal Experts Foresee For The '90s

	1988	1989	1990	1992	1994	1996	1998	2000	% Chng. 2000
Imported Crude Prices Will Double by 2000 A.D.					(1988 $/bbl.)				
High Case	14.70	17.10	18.00	20.20	22.80	26.50	30.80	35.00	
Low Case	14.70	12.40	12.89	13.80	15.80	17.70	19.50	21.70	
BASE CASE	14.70	14.40	15.00	15.90	18.90	22.50	26.00	28.00	90.5%
Gasoline Demand Will Peak in 1990 But Erode Gradually Thereafter					(Add 000 b/d)				
Motor Gasoline									
High	7.34	7.39	7.31	7.07	6.98	6.97	6.94	6.95	
Low	7.34	7.50	7.57	7.48	7.43	7.44	7.51	7.59	
BASE CASE	7.34	7.44	7.46	7.33	7.23	7.19	7.18	7.26	(1.1)
Distillate Demand Will Rise Modestly To Meet Transportation Needs									
Distillates									
High	3.22	3.28	3.31	3.37	3.43	3.50	3.57	3.62	
Low	3.22	3.34	3.36	3.48	3.54	3.60	3.69	3.76	
BASE CASE	3.22	3.32	3.33	3.44	3.49	3.54	3.61	3.69	14.6
Percentagewise, The Outlook For Residual Is Almost Rosy									
Residual									
High	1.25	1.16	1.20	1.20	1.28	1.45	1.44	1.45	
Low	1.25	1.24	1.38	1.62	1.70	1.91	2.00	2.01	
BASE CASE	1.25	1.20	1.30	1.47	1.49	1.66	1.63	1.70	36.0
Other Products (includes jet fuel, avgas, LPG, lubes, waxes, etc.)									
BASE CASE	5.20	5.24	5.35	5.47	5.55	5.66	5.77	5.96	14.6
Over-all, A Decade of Growth Will be Slow in Materializing									
Total Refined Product Supply									
High	17.01	17.00	17.04	16.93	17.09	17.48	17.60	17.81	
Low	17.01	17.39	17.76	18.17	18.35	18.78	19.19	19.53	
BASE CASE	17.01	17.20	17.44	17.72	17.78	18.05	18.19	18.61	9.4
Simultaneously, Domestic Production Will Fall About One-fifth									
Crude Oil and Products									
BASE CASE									
Crude/Cond.	8.18	7.97	7.64	6.87	6.37	6.05	5.94	5.89	
Ntl. Gas Lqds.	1.61	1.62	1.67	1.71	1.75	1.78	1.84	1.87	
Total	10.51	10.31	10.03	9.29	8.82	8.52	8.46	8.45	(19.6)
While Imports Will Skyrocket, Especially Crude Oil									
IMPORTS (including Strategic Petroleum Reserve)									
Crude	5.12	5.54	6.16	7.06	7.50	7.97	8.09	8.49	65.8
Products	1.96	2.09	2.16	2.30	2.37	2.46	2.48	2.54	29.6
Total	7.08	7.63	8.31	9.36	9.86	10.43	10.57	11.03	55.8
EXPORTS									
Crude	.17	.17	.19	.19	.19	.19	.19	.19	
Products	.64	.62	.63	.63	.63	.63	.63	.63	
Total	.81	.79	.83	.83	.83	.83	.83	.83	3.8
And U.S. Dependency on Foreign Oil Will Grow Steadily Throughout									
NET IMPORTS	6.28	6.84	7.49	8.53	9.04	9.60	9.75	10.20	62.4
% of U.S. supply	36.9	39.8	42.9	48.1	50.8	53.2	53.6	55.2	49.6

Source: Energy Information Administration, Annual Energy Outlook 1989, with some calculations by NPN.

Coastal Launches National Franchise Program

Coastal Refining and Marketing, Inc., a subsidiary of The Coastal Corp., is launching a new national franchise program for branded petroleum marketers.

The firm intends to sign up several hundred independent marketers annually to market motor fuel under the Coastal C Mart brand name.

Jack Pester, Coastal's senior vice president for refining, marketing and supply says, the company will fund, up front, the conversion cost for new station graphics (signs, logo, canopy, pump decals, paint, etc.), with repayment based upon qualified purchases of fuel from Coastal.

Steven Boyd, vice president of wholesale marketing for Coastal Refining and Marketing, Inc., says "Another unique aspect of our new program is the fact that Coastal is offering new marketers a credit card program using the latest point-of-sale (POS) electronic authorization and data capture system that provides instant on-line credit authorization." Also, new C Mart branded marketers will receive the support of Coastal's advertising and promotion.

Newly-franchised Coastal-branded gasoline stations are expected to complement Coastal's current network of 900 C-stores/gasoline outlets located in 22 states.

Marathon Unveils 92-Octane Gasoline

Marathon Petroleum Co. introduced two new 92-octane unleaded gasolines throughout the firms marketing territory last month.

A 92-octane premium unleaded gasoline was unveiled at more than 2,500 Marathon-branded service stations throughout six Midwest states. The 92-octane unleaded gasoline was also being marketed through 1,400 subsidiary locations flying the Speedway, Bonded, Gastown, Cheker, ECOL, Globe, Port and Value flags. This product will also be available to Marathon's redistribution customers throughout the firm's 22-state Midwest and Southeast marketing territory.

Analyst: Import Fee Would Be Crippling

An oil import fee or other defensive measures would be an economic debacle for consumers, oil producers and business, says industry analyst Robert L. Bradley, Jr., author of The Mirage of Oil Protection.

Preferable to "protectionist legislation," Bradley believes, is a market-oriented reforms package of tax incentives, deregulation and privatization at the state and national secter. In the book's closing section Bradley concedes, "The grain of truth in the protectionist argument is that there is an industry crisis that the government can alleviate [through] policy reform."

(Forecast . . . continued from page 28)
est surge will hike it back up to a level that's only slightly below 1988s 7.34-million b/d. The 1988-2000 decrease will be in the neighborhood of 1.1%.

Although summertime driving demands in the past have seen gasoline consumption exceed 8.0-million b/d for limited periods, the all-time high for any one year as a whole was 1978's 7.62-million b/d.

The latest forecast is contained in the Energy Information Administration's Annual Energy Outlook 1989, distributed in mid-January (see accompanying table, p28). A few weeks later, EIA also published its traditional Short-Term Forecast which, except for some unexpected increases in gasoline prices, varied little from its immediate predecessor [*NPN*—Jan. '89, p46].

As usual in forecasts of this type, the new long-term projections use three scenarios—high, low and base (or average) cases. The highs indicate what things might be like if the world price of crude gets as high as $35/bbl. by 2000. The lows use a $21 figure—about two-thirds less. The average in the new study is $28/bbl. which, while 90% higher than the current world oil price of crude, is still far below some oil company and private forecasts that talk in terms of $50/bbl. to $100/bbl. by 2000. It also is substantially lower than the $40/bbl. to $45/bbl. crude that was commonplace in the late '70s.

In its discussion of crude oil prices, the government study noted that the Organization of Petroleum Exporting Countries had implemented a production-control formula in January but that if one or more members are "unwilling to adjust production downward to stabilize prices in the future, the old pattern threatens to repeat itself so long as excess production capacity continues." This, the study says, can again bring about wide fluctuations in prices.

The key to understanding the slippage in gasoline consumption, the study says, is the role improved automobile fuel efficiency is playing. Traveling will be up an average 2.1% per year in the '90s but new-car fuel efficiency will rise too, about 1.5% per year from 28.5 mpg in 1988 to 34 mpg in 2000. Thus they'll offset each other and dampen motor fuel consumption.

As for distillates, diesel fuel for transportation will grow and take care of the annual increases in this product. What this means in reverse fashion, however, is that distillates for space-heating are either going to stand still or decline over the next decade. Distillates for space-heating, at this point in history, are the industry's second biggest liquid-oil product.

The new study reconfirms what many industry and government executives have been saying right along—that U.S. dependency on foreign oil is going to take 20 League strides in the waning years of the 20th Century.

From 36.9% of the U.S. supply in 1988, crude and product imports will leap upwards to the 55% level in 2000. This will be an increase of 62% in the liquid volume over the years. Correspondingly, U.S. liquid oil production (crude and natural gas liquids) will slump almost 20% to 8.5-million b/d.

Report Reveals Engine Damage From Low-Lead

The phaseout of leaded gasoline can adversely effect millions of engines traditionally designed for leaded fuel, according to a recently released report titled *Need for Leaded Gasoline on the Farm*.

A report prepared by the Environmental Protection Agency and the U.S. Dept. of Agriculture revealed that low-lead or unleaded gasoline can have a destructive effect on marine and recreational vehicle engines.

Gerald H. Nessenson, president of Valv-Tect Petroleum Products Corp., said at a subsequent EPA hearing, "Gasoline pumps dispensing low-lead gasoline of less than 0.5 grams of lead per gal. should be required to state the specific lead content. They should also warn that the low-lead gasoline may not protect certain engines designed to operate under high speeds and heavy loads."

He also recommended that gasoline retailers and consumers be advised by suppliers of the current reduced level of lead in leaded gasoline, and that it may not be sufficient to provide antiwear protection to certain engines.

The study analyzed eight engines, the types found in combines, trucks, farm tractors, marine and RV's, which are routinely operated with heavy cargo and depend on lead to prohibit premature engine damage and failure according to the leaded gasoline report.

Gasoline Prices Soar In Foreign Countries

The price of full-serve regular gasoline reached new heights in some parts of the country at the end of last year, according to Runzheimer International.

The pump price for full-serve regular gasoline in Abidjan, Ivory Coast was amongst the highest nationally with a price tag of $4.16/gal. In Tokyo, gasoline was priced at $4.10/gal. However, in other countries gasoline prices plummeted to an all-time low. In Caracas, for example, Venezuela gasoline was extremely cheap at 14¢/gal.

In the states, however, full service unleaded regular gasoline prices were recorded at about $1.24 during the last month of 1988.

High Priced Gasoline

Location	Fuel Price
Abidjan, Ivory Coast	$4.16
Tokyo, Japan	4.10
Milan, Italy	3.80
Naha, Okinawa	3.77
Copenhagen, Denmark	3.75**
Hamilton, Bermuda	3.43*
Dublin, Ireland	3.36
Paris, France	3.26
Helinski, Finland	3.05
Amsterdam, Netherlands	3.03
Lisbon, Portugal	3.03

Inexpensive Gasoline

Location	Fuel Price
Caracas, Venezuela	.14
Lagos, Nigeria	.30*
Quito, Ecuador	.37
Santo Domingo, Dom. Rep.	.53
Kuwait	.54
Bogota, Columbia	.56
Cairo, Egypt	.57

*price based on full-serve super
**price based on self-serve regular

Gasoline Prices Better Than Expected

Energy Information Administration's latest Short-Term Forecast, issued in late January, credited gasoline pump prices with being better than it had anticipated last fall.

The new price projections for the first half were up 6-7¢/gal. over the old numbers published in October [*NPN*—Jan. 89, p47].

The revised forecast and the old numbers (in parenthesis) were as follows:

Last quarter '88, 97¢/gal. (95¢); 1st quarter '89, 96¢/gal. (89¢); 2nd quarter, $1/gal. (93¢/gal.); 3rd quarter, $1/gal. (99¢); and fourth quarter, both numbers were the same, 96¢/gal.

Otherwise there were only minor variations between tne October and January forecasts.

Shell To Buy 18 Outlets In Chicago From Gas City

Shell Oil Co. is planning to buy up to 18 of 30 Gas City outlets in metropolitan Chicago and northern Indiana for an undisclosed amount from Gas City Ltd., a Frankfort, Ill.-based gasoline/C-store chain.

Houston-based Shell says the exact number of stations to be turned over will depend on permits and environmental issues. The deal is expected to be finalized this month.

Many of the stations are "large, modern" locations on high-traffic corners with convenience stores and four have car washes. Since the stations are generally updated, most of them will only require sign changes to the Shell brand.

Self Service Sales Still Growing At Record Rates

American motorists continue to choose self service over full service when purchasing gasoline. Since 1975, self service gasoline sales have consistently increased at record rates from 22% to 80% last year, according to Amoco Oil Co. marketing research.

The market share for self-serve last year jumped one percentage point from the previous year and represents an increase of more than six percentage points since 1984.

Self-Serve Motorist Gasoline Market Share by State (%) October 1988 vs. October 1987:

	1987	1988	chg.
Alabama	82	83	+1
Arizona	92	93	+1
Arkansas	82	83	+1
California	90	91	+1
Colorado	93	93	NC
Connecticut	70	72	+2
Delaware	84	85	+1
D.C.	85	83	−2
Florida	90	91	+1
Georgia	87	88	+1
Idaho	87	89	+2
Illinois	88	88	NC
Indiana	87	88	+1
Iowa	83	85	+2
Kansas	82	82	NC
Kentucky	78	79	+1
Louisiana	90	90	NC
Maine	52	53	+1
Maryland	85	86	+1
Massachusetts	50	52	+2
Michigan	85	87	+2
Minnesota	82	83	+1
Mississippi	82	82	NC
Missouri	84	83	−1
Montana	91	91	NC
Nebraska	78	81	+3
Nevada	91	93	+2
New Hampshire	64	65	+1
New Mexico	91	92	+1
New York	57	59	+2
North Carolina	87	88	+1
North Dakota	80	78	−2
Ohio	84	86	+2
Oklahoma	86	86	NC
Pennsylvania	64	66	+2
Rhode Island	66	66	NC
South Carolina	88	89	+1
South Dakota	80	81	+1
Tennessee	84	85	+1
Texas	92	92	NC
Utah	94	94	NC
Vermont	55	59	+4
Virginia	90	90	NC
Washington	92	91	−1
West Virginia	74	75	+1
Wisconsin	89	89	NC
Wyoming	84	86	+2